

My Money Quick Start

Personal Financial Management Tool



Getting the most out of our Personal Financial Management tool, My Money, does not require a lot of time. It takes just a few minutes to set up a few of the tools in My Money to gain a better view of your financial situation.

Dashboard

1. Add accounts from other financial institutions. Your primary accounts will automatically be added the first time you use My Money.
2. When you add accounts, your transactions and balances will update accordingly.
3. Your transactions will categorize themselves with 'tags'. To personalize these categories, select the transaction and edit the tag.

ADD UPDATE	
Show more information	
CASH	\$5,785.99
Ultimate Checking	\$4,785.99
Complete Savings	\$1,000.00
CREDIT CARDS	\$16,784.98
American Express	\$16,784.98
INVESTMENTS	\$89,078.11
401(k) Fidelity	\$89,078.11

Spending Targets

1. Navigate to the Budget tab to create Spending Targets and begin tracking spending by category.
2. Click the 'Add a new spending target' button and follow the prompts to begin track your spending by category. Popular categories to track are groceries, dining out and household.

Coffee	YOU'VE SPENT \$40 OF \$75	\$35 LEFT TO SPEND
Diningout	YOU'VE SPENT \$35 OF \$300	\$265 LEFT TO SPEND
Entertainment	YOU'VE SPENT \$31 OF \$250	\$219 LEFT TO SPEND
Household	YOU'VE SPENT \$194 OF \$500	\$306 LEFT TO SPEND
Personal	YOU'VE SPENT \$283 OF \$550	\$267 LEFT TO SPEND

Cashflow

1. Navigate to the Cashflow tab to see your projected day-to-day cash flow.
2. Add Incomes & Bills like your paycheck, rent or utilities to more accurately forecast your cash flow.

SUN	MON	TUE	WED	THU	FRI	SAT
30	1 \$2,500 \$100 -\$100	2 -\$878	3 -\$50 -\$2,500	4	5 \$1,205	6 -\$80
7 -\$50 -\$100	8 \$100	9	10	11	12 \$100 -\$100	13
14 -\$405	15 \$5,000 \$100 -\$200 1 More	16	17 -\$50 \$4,736	18 -\$335	19 \$1,205	20 \$5,766
21 \$5,766	22 \$100	23	24 -\$100	25 \$5,716	26 -\$100	27 \$5,596
	\$5,866	\$5,866	\$5,716	\$5,716	\$5,596	\$5,596

Goals

1. Follow the prompts in the Goals tab to create one or more financial goals.
2. Select from the available savings and payoff goal types to begin tracking your progress towards your financial aspirations.



Congratulations!

You've completed the Quick Start set-up. Now continue to explore and monitor your finances!

If you have any questions contact our Client Care team.